STANDARD OPERATING PROCEDURE

Patient Intake and Registration SOP

Document no.	SOP-HLC-001
Revision	1.0
Owner	Patient Access Supervisor
Effective date	September 15, 2026
Review cycle	Every 12 months

1. Purpose

To register every patient accurately and safely, confirm identity before any clinical activity begins, and hand off a complete record to the care team without delay.

2. Scope

Applies to walk-in and scheduled patient registration at front desk and rooming stations. Emergency department triage and telehealth intake are covered by separate SOPs.

Definitions

Two-identifier check	Confirming a patient's identity using two unique identifiers, such as full name and date of birth, matched against a photo ID.
EHR	Electronic health record system used to document demographics, visit notes and clinical data.
Red flag symptom	A symptom reported at check-in that may need immediate clinical attention, such as chest pain or difficulty breathing.

3. Responsibilities

Patient Access Representative	Greets patients, verifies identity and insurance, collects consent forms and enters demographics in the EHR.
Registered Nurse (RN)	Rooms the patient, records vital signs, reconciles medications and allergies, and screens for urgent symptoms.
Patient Access Supervisor	Resolves registration discrepancies, oversees front desk staffing and audits registration accuracy.
Provider	Receives the intake summary, reviews flagged issues and begins the clinical visit.

RACI matrix

Activity	Patient Access Representative	Registered Nurse (RN)	Patient Access Supervisor	Provider
Verify patient identity and demographics	R/A	I	C	-
Verify insurance and collect consents	R/A	-	C	-
Screen for urgent symptoms at	R	A	I	I

Activity	Patient Access Representative	Registered Nurse (RN)	Patient Access Supervisor	Provider
check-in				
Record vital signs and reconcile medications	-	R/A	-	I
Resolve registration discrepancies	R	-	R/A	-

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Electronic health record (EHR) or practice management system
- Government-issued photo ID scanner
- Insurance card scanner or manual entry form
- Wristband printer and blank wristbands
- Consent and privacy acknowledgment forms
- Vital signs equipment (blood pressure cuff, thermometer, pulse oximeter)
- Patient intake and health history questionnaire
- Interpreter phone line or translation service access

Personal protective equipment

- Disposable gloves for taking vital signs
- Hand sanitizer at the registration desk

5. Procedure

Step	Task	Owner	Done
5.1	**Greet the patient and confirm the visit** Greet the patient by name where possible, confirm the scheduled appointment or reason for the walk-in visit, and direct them to the registration desk or kiosk.	Patient Access Representative	☐
5.2	**Verify identity with two identifiers** Ask the patient to state their full name and date of birth, then match this against a government-issued photo ID and the EHR record before proceeding. **Checkpoint:** Identity is confirmed with two identifiers matching the photo ID before any form or wristband is generated.	Patient Access Representative	☐
5.3	**Update demographics in the EHR** Confirm or correct the patient's address, phone number, emergency contact and preferred language in the EHR, and note any accessibility or interpreter needs.	Patient Access Representative	☐
5.4	**Verify insurance and collect payment** Scan or enter the insurance card, run an eligibility check in the practice management system, and collect any co-pay or outstanding balance according to facility policy.	Patient Access Representative	☐

Step	Task	Owner	Done
5.5	**Collect consent and privacy forms** Provide the privacy practices acknowledgment and treatment consent forms, explain their purpose in plain language, and obtain the patient's signature. **Checkpoint:** Signed consent and privacy forms are on file in the EHR before the patient is roomed.	Patient Access Representative	☐
5.6	**Print and apply the ID wristband** Print the wristband from the EHR record, read the name and date of birth aloud to the patient to confirm, and apply it before any clinical contact. **Checkpoint:** Wristband information matches the EHR chart exactly before the patient leaves registration.	Patient Access Representative	☐
5.7	**Screen for urgent symptoms** Ask a short set of screening questions for symptoms such as chest pain, difficulty breathing or severe bleeding while completing paperwork. **Warning:** If the patient reports a red flag symptom, stop registration and get a nurse or provider immediately.	Patient Access Representative	☐
5.8	**Room the patient and take vital signs** Escort the patient to the exam room, take and document blood pressure, pulse, temperature and oxygen saturation in the EHR according to facility policy.	Registered Nurse (RN)	☐
5.9	**Document the reason for the visit** Record the chief complaint, onset and relevant history in the patient's own words in the EHR so the provider has an accurate starting point.	Registered Nurse (RN)	☐
5.10	**Reconcile medications and allergies** Review the current medication list and allergy history with the patient, update the EHR, and flag any new allergy or discrepancy for the provider. **Checkpoint:** Allergy status is confirmed and visible in the EHR banner before the visit begins.	Registered Nurse (RN)	☐
5.11	**Resolve registration discrepancies** When identity, insurance or demographic information cannot be confirmed, the supervisor works with the patient and payer to resolve it before the visit is billed.	Patient Access Supervisor	☐
5.12	**Hand off to the provider** Summarize the reason for visit, vital signs and any flagged issues for the provider, either verbally or through the EHR task queue, before leaving the room.	Registered Nurse (RN)	☐

6. Quality checks

- Two-identifier verification is documented for 100 percent of registrations.
- Wristband information matches the EHR chart on spot checks during the shift.
- Signed consent and privacy forms are scanned into the chart within the same visit.
- Insurance eligibility is verified before service wherever the payer allows same-day checks.

7. Records

- Signed consent and privacy acknowledgment forms
- Insurance verification and eligibility results
- Vital signs and intake questionnaire in the EHR
- Registration discrepancy log

8. KPIs

- Average registration time per patient
- Percentage of visits with insurance verified before service
- Wristband or identity error rate
- Rate of same-day registration corrections

9. Common mistakes

- Confirming identity by room number or appointment order instead of two identifiers.
- Printing the wristband before demographics are corrected in the EHR.
- Skipping the medication and allergy reconciliation question to save time.
- Not escalating a patient reporting urgent symptoms while still filling out paperwork.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Ilia Pirozhenko

Approval

Prepared by	Approved by	Date

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